OSC HR/PAYROLL SAP Training

Introduction to Create and Maintain Employee Data PA300 VC

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Notes

Welcome to *Introduction to Create and Maintain Employee Data*, PA300 VC.

This virtual class is taught in two sessions: A and B. Based on the pace of the class, the instructor will determine a logical place to conclude session A (which may or may not be at the end of a lesson).

BEACON Training-Welcome and Introductions

Welcome to the *Create and Maintain Employee Data* course.
- Introductions
- Breaks
- Parking Lots
- Classroom etiquette
  – Cell phones off
  – Quiet side conversations

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Notes

The course introduction is an opportunity to get to know others who are attending class as well as to agree on classroom courtesy. The instructor will inform you about the building facilities and when breaks will occur.

Please make sure you receive credit for attending class by signing the attendance sheet.
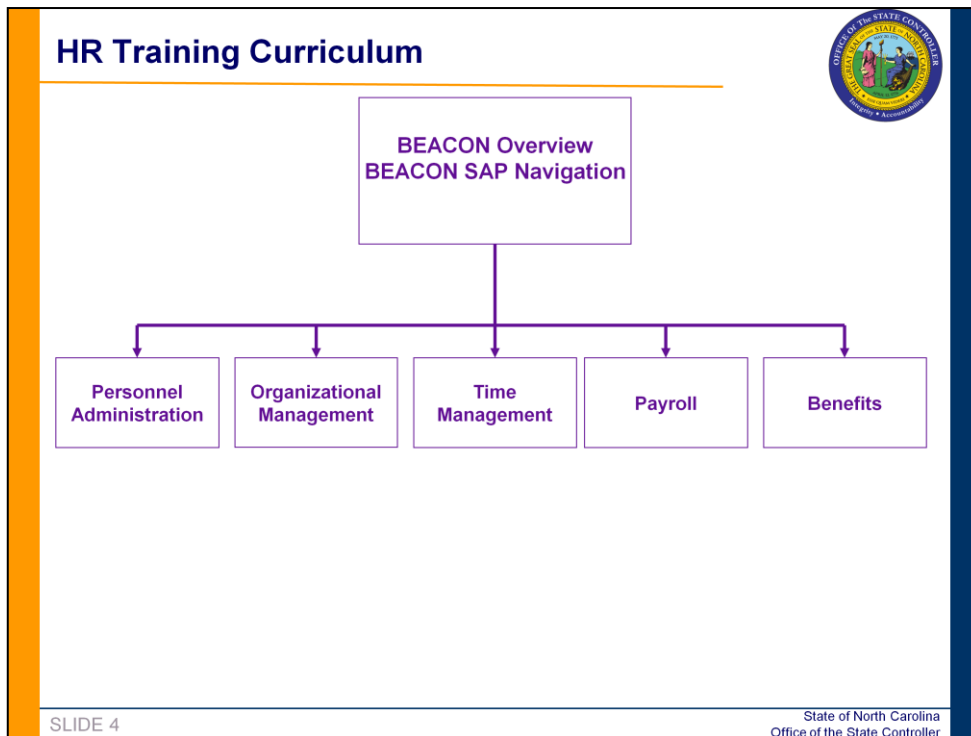
Prerequisites

- BEACON Overview BC100
- BEACON SAP Basic Navigation BC110
- Personnel Administration Overview PA200
- Personnel Administration Terms, Concepts, and Display Data PA210
- Virtual Classroom Overview VC101

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Notes

There are four prerequisites that you must take before attending this course. Attending these prerequisites ensures that you are adequately prepared with the new processes, concepts, and terms that are needed for successful completion of the *Introduction to Create and Maintain Employee Data* course.
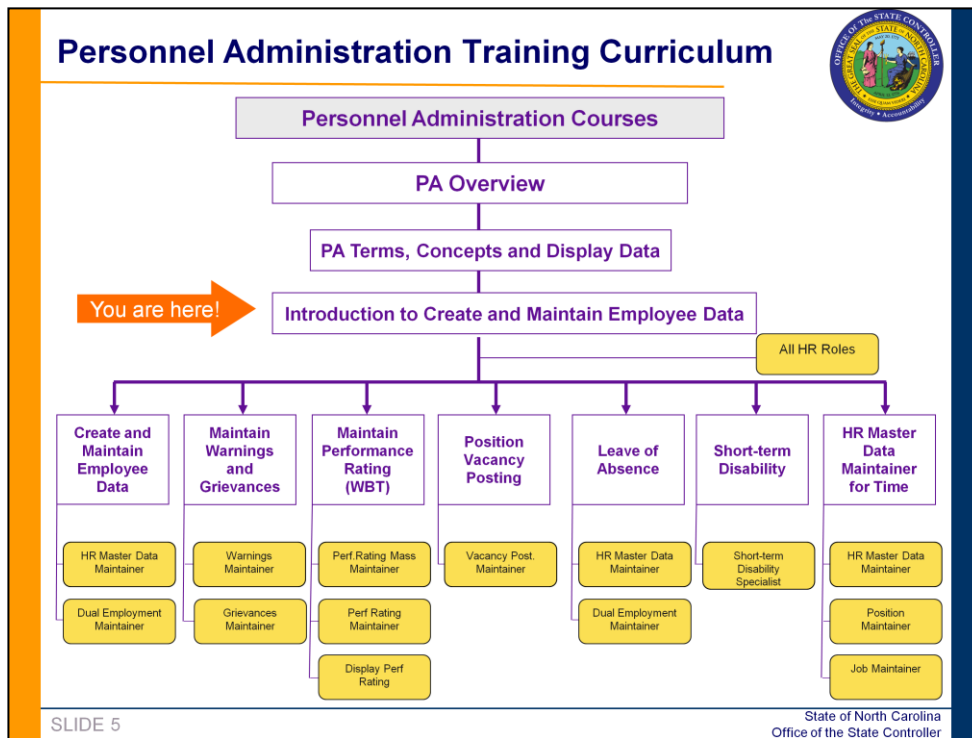
HR Training Curriculum

BEACON Overview
BEACON SAP Navigation

- Personnel Administration
- Organizational Management
- Time Management
- Payroll
- Benefits

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Notes

The OSC HR/ Payroll training program comprises several courses and different modules. Based on your HR role, you will attend courses in the Personnel Administration module.

BEACON Overview and BEACON SAP Navigation are self-paced, web courses.

Personnel Administration Training Curriculum

Personnel Administration Courses

PA Overview

PA Terms, Concepts and Display Data

You are here! → Introduction to Create and Maintain Employee Data

All HR Roles

Create and Maintain Employee Data	Maintain Warnings and Grievances	Maintain Performance Rating (WBT)	Position Vacancy Posting	Leave of Absence	Short-term Disability	HR Master Data Maintainer for Time
HR Master Data Maintainer	Warnings Maintainer	Perf.Rating Mass Maintainer	Vacancy Post. Maintainer	HR Master Data Maintainer	Short-term Disability Specialist	HR Master Data Maintainer
Dual Employment Maintainer	Grievances Maintainer	Perf Rating Maintainer		Dual Employment Maintainer		Position Maintainer
		Display Perf Rating				Job Maintainer

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Notes

Within the Personnel Administration module, there are several courses. Your position determines which courses you may be required to attend.

Personnel Administration Overview (PA200) is a self-paced, web course.

Course Map

Lesson 1: Connecting the OSC HR/Payroll Dots

Lesson 2: Maintaining Employee Data

Lesson 3: HR Reports Overview

Lesson 4: Course Review

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Notes

Course Objectives

Upon completion of this course, you should be able to:

- Recall terms and concepts from the *Personnel Administration Terms, Concepts and Display Data* course

- Explain how Personnel Administration infotypes affect Time, Benefits and Payroll

- Modify existing employee data

- Identify the options to access reports

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Notes

Welcome: Strategy for Training

Tell me	Concepts
	Your Instructor will describe the process, responsibilities and the transactions – LISTEN
Show me	Demonstrations
	Your Instructor will demonstrate job-related tasks performed in BEACON SAP – HANDS OFF
Let me	Exercises
	You will complete the exercises which allow for hands-on practice in class – HANDS ON
Support me	Availability
	Your Instructor will be available to answer questions while you complete the exercises

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Notes

The *Introduction to Create and Maintain Employee Data* Student Guide provides a copy of the PowerPoint presentation used in the classroom training. You will observe that space is available for you to write notes. You can use the guide as a reference when you return to the workplace. For example, you can use the exercises for practicing in the OSC HR/Payroll SAP training environment.

You may also find it useful to take the Employee Self-Service and Manager Self-Service courses although they are not required for the PA curriculum. They are, however, mandatory for other requirements.

Course Map

Lesson 1: Connecting the OSC HR/Payroll Dots

Lesson 2: Maintaining Employee Data

Lesson 3: HR Reports Overview

Lesson 4: Course Review

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Notes

Lesson Objectives

Upon completion of this lesson, you should be able to:

- Recall terms and concepts from the *PA210 Terms, Concepts, and Display Data* course.

- Identify that entries made in PA affect an employee's time, benefits or pay.

- Describe how a work schedule assignment affects an employee's pay.

- Identify and revise the time settings on a position

- Explain when to notify payroll regarding changes in settings

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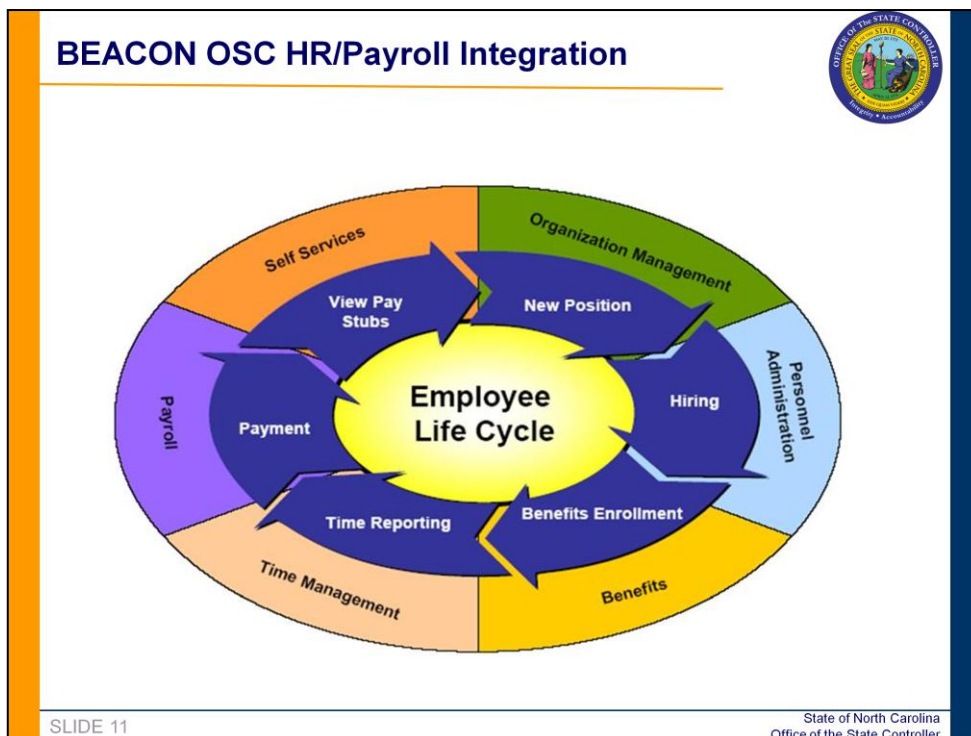
Notes

Notes

Based on the data you viewed in *PA210 Terms, Concepts and Display Data*, you should have a good understanding of the various infotypes that are part of an employee's personnel record. Because OSC HR/Payroll is an integrated system, every entry made in Personnel Administration affects some component of an employee's time and pay.

Some infotypes for which PA is responsible are applied directly to the employee. Many of the infotypes that affect an employee's time and pay display automatically during PA Actions. Other infotypes are applied to the position, which also affect how the employee enters time and is subsequently paid.

PA Infotypes and Time, Benefits, Payroll

- IT0000 - Actions
- IT0001 - Organizational Assignment
- IT0002 - Personal Data
- IT0006 - Address (permanent)
- IT0007 - Planned Working time
- IT0008 - Basic Pay
- IT0041 - Date Specifications
- IT0552 - Time Specification/Employ. Period
- IT2003 - Substitution
- IT2001 - Absences

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Notes

The infotypes listed above are entered in PA, but affect an employee's time, benefits and payroll. It is important to understand how the entries made in PA are related to results in those areas. Note that the above list represents only a few PA infotypes; it is in no way a complete list of all PA infotypes.

Notes

The **Actions 0000** infotype indicates the events that occurred on the employee's personnel record. Some examples are: New Hire, Promotion, Range Revision, etc. Actions are covered in more detail in *PA310 Create and Maintain Employee Data*. In addition, the infotype shows the employment status (Active, Inactive, Withdrawn). Time, Payroll and Benefits use information from IT000.

Time, Payroll and Benefits pull information from **Organizational Assignment IT0001.** All of the fields on this infotype default from the position assigned to the employee.

Personnel area: Used by Payroll to determine where wages and salaries are posted and from where they are paid

Subarea: Identifies various working schedules for Time Management rules

Cost Center, Fund, Functional Area, Business Area: Are related to Finance and Funding

Employee Group: Drives benefits eligibility, leave and pay calculations

Employee Subgroup: Defines work status (full time, part time) overtime rules, and impacts benefits

Payroll area: Determines the payroll cycle

Work Contract: Identifies if employee will pay full or partial cost for health insurance premiums

Percentage: Always 100%

Position and Job: The position to which the employee is assigned and the job to which the position is related

Organizational Unit: An entity within the organizational structure

Personal Data 0002

Display Personal Data (0002)

Personnel No	80000327	Name	Kumar Reinaldo02
EEGroup	A SPA Employees	PersA	4601 Cultural Resources
EESubgroup	A1 FT N-FLSAOT Perm	Statu	Active
Start	08/28/1956 To 12/31/9999	Changed on	06/09/2008 ECATT

Name

Title	Name Format 00
Last name	Reinaldo02
First name	Kumar
Middle name	Initials
Designation	Nickname
Suffix	
Name	Kumar Reinaldo02

HR data

SSN	602-76-8139
Date of Birth	08/28/1956
Language	EN English
Marital Status	Single

Gender: ● Female ○ Male

Dependents 0

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Notes

Personal Data IT0002

Social security number, date of birth and marital status—information that is important for tax reporting, payroll, and benefits.

Addresses IT0006

The various tax infotypes (Residence Tax, Work Tax Area, Unemployment State) are dynamically associated with IT0006 – permanent address. If IT0006 is skipped during the New Hire Action, the tax infotypes do not display, and the employee's record will error out in payroll. **NOTE:** When entering an address, always begin with *Address line 1* and only use Address line 2 when necessary to enter additional address information.

If the address information is incorrect:

- a separated employee does not receive the final pay.
- employees do not receive W2s at the end of the year.

Planned Working Time: The Work Schedule Rule (WSR) is the foundation upon which an employee's time is processed in BEACON SAP. Each employee is assigned a WSR in PA that best represents his or her work pattern. The WSR combines an assigned holiday calendar (the main State holiday calendar or an alternate calendar approved by OSP) with a repeatable pattern of work representing an employee's scheduled work days as well as scheduled non-work days. The WSR can represent work patterns repeated over a single or multiple weeks and may include day, evening and night shift designations that trigger premium payments (if applicable) at rates designated on the employee's position (if the position is appropriately flagged). The WSR does not limit the number of hours an employee may record on any given day, but will only allow leave to be taken on scheduled work days. Many fields are dynamic and trigger other time functions. For example, Time Sheet Defaults (IT3015) are directly related to the Time Management Status field on IT0007. A Time Mgmt Status of "1" indicates that a time sheet is required, whereas a "9" indicates a Time Sheet is not required. If a negative time employee is on Leave of Absence, IT0007 must be revised to change the employee to positive during the Leave and changed back to negative upon Reinstatement.

An employee should only be assigned as a negative time employee if he or she is working 5 days a week, 8 hours a day.

Notes

Notes

Example of IT007 Impacts Employee's Pay (1st and last pay)

To show how IT0007 affects an employee's pay, the following describes two employees hired on the same day but given two different work schedules. Both employees are paid $6,250 monthly salary.

Employee **A** starts on Sept 19 and is assigned work schedule D01N08GN which has 22 possible work days in the month. Counting Sept. 19th, the employee worked 8 days of the possible 22. The Pay is figured by this formula: 8 days divided by 22 times the monthly rate ($6,250) = $2,272.73 paid for the month for Employee A (based on IT0007 and IT0008).

Employee **B**'s work schedule (D92WVA01) has 16 possible work days in the month. Counting the first day Employee B reported to work (9/19), the employee worked 6 out of the 16 days. The number of days worked (6) divided by the possible work days (16) times the monthly salary ($6,250) calculates a pay of $2,343.75.

You can see that both employees were paid correctly, yet the specific work schedule, in conjunction with IT0008, determined two different pay outcomes for the employees once again illustrating how entries made in PA affect employee pay or time.

Notes

Basic Pay: Salary or hourly wages. The *Salary Amount* button does not calculate for DOT employees, but does calculate for all non-DOT wage types.

You would seldom make an entry directly on IT0008. Adjustments involving an employee's pay would result from an Action.

Date Specifications IT0041

Time evaluation bases leave accruals and longevity payments on date types contained on IT0041 for all permanent employees. (Newly hired Supplemental Staff employees will not have IT0041.) Initially the Original Hire Date and Agency Hire date are the same. If an employee has a Reinstatement Action (either the employee was on Leave of Absence (LOA) and returned, or left State employment and returned), or Transfer Action, the Agency Hire date will automatically reflect the date of the Reinstatement or Transfer Action.

Notes

Time Specification/Employ. Period IT0552

Creditable service earned prior to BEACON must be entered on IT0552. Once an employee is entered into BEACON, the system automatically calculates creditable service and the longevity date through the Time module. If HR makes changes to IT0552 that affect the longevity date, BEACON will take back any money already paid out and repay based on the new longevity date. If you do make a change on IT0552, you must email BEST with the name of the employee. Keep in mind that you will never adjust the original IT0552 entry from conversion. For example, if an employee has creditable service from more than one organization, you would enter additional IT0552s to add the additional organizations (you would not extend the date on the original IT0552 to include the additional service dates).

Notes

Notes

The **Substitutions 2003** infotype is used to indicate that the employee is temporarily working something other than his or her regular schedule. Substitutions may be daily or for weeks at a time. IT0007 – Planned Working Time is overwritten with the properties of the Substituted schedule. An example could be when:

- An employee is working at a time other than his or her planned work schedule (for example: employee works a shift with premium pay is being asked to work a shift where premium pay is not eligible or is eligible at a different rate, or vice versa).

Substitution is *only* used when the work schedule change is temporary. If the employee will be permanently assigned to a new schedule, use IT0007 to change the Work Schedule Rule appropriately.

Notes

The **Absences 2001** infotype indicates the number of hours the employee wants to exhaust for leave while on Leave of Absence or the number of hours the employee is taking unpaid leave. While IT2001 is entered during the LOA Action, it may be necessary to use PA30 in some circumstances such as:

- The employee wants to exhaust more than one leave type while on LOA. Since only one type can be entered in the LOA Action, PA30 is necessary to enter the additional leave types.

- The employee does not return when expected and wants to extend the use of leave.

- The employee returns earlier than planned and the infotype is delimited.

When the dates are entered, the hours that default are based on the work schedule rule entered on the Planned Working Time infotype (0007) which was part of the LOA Action.

Because OSC HR/Payroll is integrated, the hours entered on the Create Absences infotype are processed during the next time evaluation run. A time sheet should not be created.

As long as the employee is using approved leave while on LOA (does not include receiving Short-Term Disability nor Worker's Comp payments), benefits will continue to be deducted. If not receiving pay, the employee must pay for benefits or discontinue them.

Notes
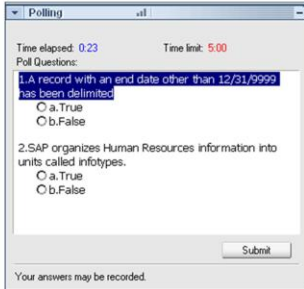
If the employee is exhausting leave during a time that includes a holiday, additional 2001 infotypes will be necessary to allow the employee to take holiday leave. The additional 2001 records are created in transaction PA30. For example, assume an employee is going out on military leave on July 1 and wants to exhaust 160 hours vacation prior to beginning the military 30 days. In this scenario, there is one holiday period (7/4). Your entries would be as follows:

1. During the LOA Action, on the Absences (2001) infotype subtype 9000, you will enter the dates for the leave to be exhausted **up to** the holiday period in the Start and To fields:

   Start: 7/1/2008   To: 7/3/2008 (24 hours **leave**)

2. Create a PA30 to enter the first holiday period, infotype 2001, subtype 9300:

   Start: 7/4/2008   To: 7/4/2008 (8 hours **holiday**)

3. Create a PA30 to enter the remaining leave, infotype 2001, subtype 9000:

   Start: 7/5/2008   To: 7/28/2008 (136 hours **leave**)

1. The options selected in the Work Contract field on Organizational Assignment indicate if the employee will pay full or partial cost for health insurance premiums.

   ○ True ○ False

2. The fields on the Organizational Assignment infotype automatically default from the position to which the employee is assigned.

   ○ True ○ False

3. The various tax infotypes are dynamically associated with which of the following PA infotypes?

   a. Actions

   b. Addresses (permanent)

   c. Organizational Assignment

   d. Planned Working Time

4. The Planned Working Time IT0007 contains the foundation upon which an employee's time is processed?

   ○ True ○ False

5. Updates on IT0008 – Basic Pay are not made directly on the infotype but are made via Actions.

   ○ True ○ False

Position Infotypes - Employees and Time

Position flags set on specific infotypes also affect employee time and pay

- Overtime Compensation – IT9005
- Holiday Payout Period – IT9006
- Night Shift Premium – IT9007
- Evening Shift Premium – IT9008
- Weekend Shift Premium – IT9009
- Holiday Premium Rate – IT9010
- On-Call – IT9011
- Callback – IT9012

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Notes

HR personnel that have access to PO13 are responsible for updating the above infotypes on a position. The employee may enter hours correctly and the hours may have been approved by the manager, but unless the position infotype is flagged correctly, the employee will not receive the correct pay.

It is important to understand that if you **revise** a **position** setting that is **retro** to a pay period prior to the current pay period, you **must contact BEST Payroll** to let them know to run time eval on the affected employee's retro to that same time period. You only need to contact BEST Payroll if you retro-revise a position. If you only revise time on an employee, OSC HR/Payroll will automatically retro the time eval run.

In Organizational Management, the infotype codes do not display like they do in PA. To see the infotype number in PO13, select the infotype, and then click the "Activate infotype" button at the top of the screen. The infotype number will display in the message at the bottom of the screen.

Activate Infotype button:

Notes

Overtime Compensation (IT9005)

If time worked beyond the overtime limit (40 hours, etc.) is to be paid or accumulated as compensatory time, the position must have a valid IT9005 record. If overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-subject only) at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked. The default is 365 days. The setting on IT9005 in conjunction with IT2012 (discussed later) determines the rules around the overtime compensation.

As indicated previously, an employee may have worked over 40 hours and entered the hours on the time sheet and they may have been approved by the manager. But unless the position Overtime Compensation infotype is flagged correctly, the employee will not receive overtime compensation. An IT9005 record is not required if the position is not eligible for overtime pay or compensation.

Holiday Payout Period (IT9006)

If holiday compensatory time (equal time off for time worked on a holiday) is to be paid out at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked.

The default is 365 days. If no record exists, the default value of 365 applies.

Notes

Positions eligible for any of the premiums listed below must have valid infotypes.

Night Shift Premium (IT9007)

OSP approved rates other than the default of 10% must be entered in the rate field.

Evening Shift Premium (IT9008)

OSP approved rates other than the default of 10% must be entered in the rate field.

Weekend Shift Premium (IT9009)

OSP approved rates other than the default of 10% must be entered in the rate field.

The various types of premium pay display as separate line items on the employee's pay stub only if the rates are different. For example, if an employee's evening and night shift are both 10%, the hours worked in the evening and night are added together on one "Shift Premium" line item on the pay stub with the rate of 10%. On the other hand, if the evening rate is 10% and the night is 15%, two separate line items will show with the hours entered for the evening separate from the hours entered for night.

Holiday Premium Rate (IT9010)

IT9010 is only required if the Holiday Premium Rate is different than 50%.

OSP approved rates other than the default of 50% must be entered in the rate field.

On-Call (IT9011)

Positions eligible for On-Call compensation must have a valid IT9011 record.

The accrued box should be checked if the time is to be collected as On-Call comp time. The rate field must be populated with the OSP approved on-call rate.

Notes

Callback (IT9012)

Positions eligible for Callback compensation must have a valid IT9012 record. The decision to pay versus comp time is determined by the Callback Accrual checkbox.

Notes

IT2012 – Time Transfer Specifications

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The "Time Transfer Specifications" infotype (IT2012) can be used to influence time management behavior and is typically applied to an employee by the Time Administrator. Infotype 2012 records are created for specific employees for specific periods of time. As the HR Master Data Maintainer, it may be helpful if you understand the following subtypes for the time infotype 2012:

Z004 - Set Actual Pay Behavior

Applicable for "positive time/exception pay" employees. This subtype record will cause the generation of "leave without pay" wage types to fill the difference between reported hours and planned hours. In effect this causes the employee to be treated as a "positive time/actual pay" employee.

Z005 - PERT Eligibility and Rate

This subtype is applicable for DOC employees eligible for PERT (Prison Emergency Response Team) premiums.

Z006 - Holiday Ineligibility

This subtype record will cause the suppression of Holiday Premium Pay during the validity period specified.

Z007 - Baylor Plan – Reg (Beg)
ZZ07 - Baylor Plan – Reg (End)
Applicable RNs working under a regular Baylor Plan contract.

Z018 - Baylor Plan + Bonus (Beg)
ZZ18 - Baylor Plan + Bonus (End)
Applicable RNs working under a Baylor Contract with a bonus at the completion of the contract

Z008 - Incentive Pay – RN (Beg)
ZZ08 - Incentive Pay – RN (End)
Applicable RNs working under an Incentive Pay contract

Z019 - Incentive Pay – LPN (Beg)
ZZ19 - Incentive Pay – LPN (End)
Applicable LPNs working under an Incentive Pay contract

Z009 - First 10 hrs Comp
Applicable for subject employees who have a position with an Overtime Eligibility (IT9005) record that does not indicate "pay immediately". This subtype record will cause the additional hours worked beyond 50 in a week to be "paid immediately". The first 10 hours of additional time worked will be compensated with Compensatory Time at the appropriate rate.

Knowledge Check #2

– Use your computer to answer the questions and then click **Submit**.

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Notes

1. Time evaluation bases leave accruals and longevity payments on information contained on which infotype?
    a. Actions
    b. Date Specifications
    c. Organizational Assignment
    d. Planned Working Time

2. If an employee has creditable service that needs to be added to the record on IT0552-Time Specification/Employ. Period, which of the following is the correct way?
    a. Extend the dates on the original IT0552 so that the number of months calculate correctly
    b. Add a new IT0552 and send an email to BEST

3. If an employee is working a different schedule temporarily, which infotype is used?
    a. Substitutions IT2003
    b. Planned Working Time IT0007

4. If an employee is working a different schedule permanently, which infotype is used?
    a. Substitutions IT2003
    b. Planned Working Time IT0007

5. A factor that affects an employee's overtime, shift premium and holiday pay are the settings on the employee's position.
    ○ True   ○ False

Performing Class Exercises (1 of 2)

After you logon to SAP, use the icons on your taskbar to move back and forth between the Training Center presentation and SAP

Close all others

Leave but do not use

Start | Training C... | STATE OF... | Training S... | SAP Logo... | SAP Easy ...

Task Bar

Toggle between Training Center and SAP icons
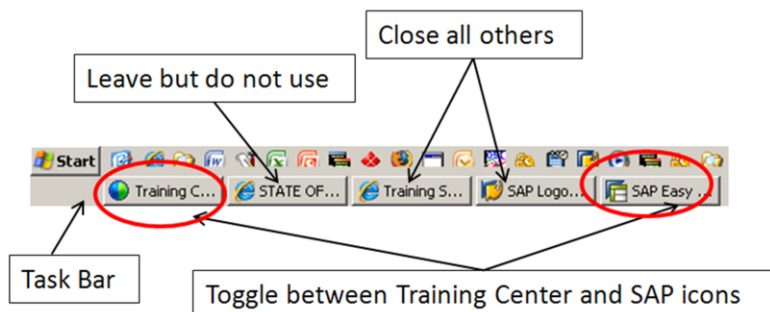
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Notes

To perform exercises in a virtual class, you will navigate back and forth between the SAP application and the Webex Training Center. You will close some of the icons that display on your taskbar to make it less confusing about which icons to use.

Look at the bottom of your screen now and you should see two icons:

- State of NC- Office of Controller Webex
- Training Center

You will leave both of these **open** during the course. If you have **other** applications open, you should **close** them now.

Give me a green check to let me know you see these two icons on your taskbar.

Performing Class Exercises (2 of 2)

After you complete a Virtual class exercise in BEACON SAP:

- Access the Training Center from your taskbar
- In the Participant's panel, click the **green check** icon

- Leave the green check active – the instructor will clear it

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Notes

By using the green check to indicate you have completed an exercise, the instructor can see at a glance those students who may need additional time.

Exercise 1.1

Log onto SAP:

1. Use the task bar to open a new internet window.
2. Access SAP with your own user id and password.
3. Click the training GUI.
4. Click Training Sandbox E1T 899.
   a) If necessary, enter your own user id and password again.
5. The Easy Access screen displays.
6. On the taskbar, **leave open** the **Training Center, SAP Easy Access** and **State of NC** icons; <u>close</u> all <u>other</u> icons.
7. Click the Training Center icon on your taskbar to return to the Training Center.
8. Use the **Green Check** icon to let the Instructor know you have successfully logged on. Instructor will remove the check.

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Notes

Exercise 1.2

- You have received verification that the position settings should be revised on the Information & Communication Specialist II position.

- Beginning today, the position will be eligible for Overtime Compensation and Holiday Payout.

Student #	Position #
1	65002527
2	65002528
3	65002529
4	65002530
5	65002531
6	65002532
7	65002533
8	65002534
9	65002535
Instructor	65002536

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Notes

Lesson Review

In this lesson, you learned to:

- Recall terms and concepts from the *PA210 Terms, Concepts, and Display Data* course.

- Identify that entries made in PA affect an employee's time, benefits or pay.

- Describe how a work schedule assignment affects an employee's pay.

- Identify and revise the time settings on a position.

- Explain when to notify payroll regarding changes in settings.

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Notes

Course Map

Lesson 1: Connecting the OSC HR/Payroll Dots

Lesson 2: Maintaining Employee Data

Lesson 3: HR Reports Overview

Lesson 4: Course Review

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Notes

Lesson Objectives

Upon completion of this lesson, you should be able to:

- Describe the process to maintain (update) employee data
- Identify the transaction code used to update employee data
- Distinguish among the editing functions
- Use OSC HR/Payroll SAP to maintain employee data
- Identify the steps needed prior to creating an employee's benefits adjustment
- Create a substitution
- Revise a work schedule
- Create a benefits adjustment

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Notes

In this lesson, you will enter data into specific infotypes, based on the type of information that needs to be created or revised. You will determine and select the specific infotype to be revised.

Workflow (the electronic approval process) is not required for maintaining employee data; however, you should continue to use the proper documentation that authorizes the revisions you are making, just as you have done in the past.

PA 30 – Maintain Master Data

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Notes

After employees are hired, circumstances may arise that make it necessary to enter new data or revise existing data.

Use **PA30** to access the Maintain HR Master Data screen. There are several options available, which are the same options you saw in **PA20**-Display Master Data. The options are:

Tabs: The infotypes are grouped together by subject matter on a Tab menu. Simply select the Tab you want to access, or use the display all tabs button. After you select the appropriate tab, you may have to scroll to find the specific infotype.

Period: You have various options regarding the time frame you wish to use when displaying an infotype. Some infotypes will display only if the All option has been selected.

Direct Selection: You can either enter the infotype code and subtype in the Direct Selection field, or use the matchcode to search for the infotype. You don't have to be on a specific tab to use the Direct Selection option.

Infotype Dates

- Effective (start) must be entered

- OSC HR/Payroll SAP applies 12/31/9999 as end date

- Former data (when applicable) is delimited one day prior to the new effective date

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Notes

Each entry must have an effective (beginning) date and an ending date. In most cases you will not enter an end date; OSC HR/Payroll SAP will automatically apply the end of time for the new data. In addition, OSC HR/Payroll SAP automatically delimits the previous infotype to one day prior to the new data.

Infotypes Delimited — SLIDE 45

Notes

In the above example, the employee moved to a new permanent address effective 8/16/2007. When the new permanent address was entered with the 8/16/2007 effective date, OSC HR/Payroll SAP automatically assigned the end date as 12/31/9999 and delimited the old permanent address to 8/15/2007.

The employee's other addresses, emergency contact and mailing address, still have their original end dates of 12/31/9999 because no changes have been made to them. In this case, the Addresses infotype has several subtypes, all with ending dates of 12/31/9999.

NOTE: The Emergency subtype is an exception to the automatic delimit rule. OSC HR/Payroll assumes an employee may have more than one emergency contact; therefore the previous emergency record is not automatically delimited. You must manually delimit the previous emergency record if it is no longer applicable.

PA Infotypes Online Job Aid

- Job Aid – Online you will find a list all Personnel Administration (PA) infotypes and their descriptions.

- Exercises: In the exercises that follow you will maintain the following infotypes:

  – Verify Education

  – Monitoring of Tasks

  – Objects on Loan

  – Bank Details

  – Substitutions

  – Planned Working Time

  – Adjustment Reasons

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Notes

The *PA Infotypes* job aid is available online. The job aid contains a complete list of all the infotypes used in Personnel Administration, including codes and brief descriptions.

In this class, you will have an opportunity to maintain several infotypes. After you learn to maintain one infotype, you will realize that generally you use the same process and methodology to maintain any infotype.

Discuss with the Instructor any questions you have about infotypes and their descriptions.

A condensed version of the job aid is available as a handy job aid for use at your work station. The condensed version is also available online by the title of Dashboard Front and Dashboard Back.

http://help.mybeacon.nc.gov/beaconhelp/Human_Resources/Personnel_Admin/Job_Aids/pdf_Dashboard%20for%20PA_front%20V2_020108.pdf

http://help.mybeacon.nc.gov/beaconhelp/Human_Resources/Personnel_Admin/Job_Aids/pdf_Dashboard%20for%20PA_back%20V3_022608.pdf

Maintain HR Master Data

Maintaining HR Master Data records involves processing existing HR master data records by one of the following functions:

- Creating new data
- Changing existing data
- Delimiting existing data
- Deleting data (only used by HR!)
- Copying data (to maintain history)

Access is determined by OSC HR/Payroll SAP security and your HR BEACON roles.

Employees with access to Employee Self-Service can make certain changes to their employee records.

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Notes

Using **PA30 – Maintain Master Data**, allows you to use the various functions to create, correct, copy, change, and delete information, or enter a stop date on a specific infotype.

As indicated in the OSC HR/Payroll SAP Navigation course, screens and tasks to which you have access are determined by your BEACON SAP security role. Only certain business roles will have the security access to maintain master data records for the employees in your agency.

Some personnel information can be changed by the employee through Employee Self-Service (ESS), including:

- Tax Withholding
- Addresses
- Family Member/Dependents
- Bank Information

However, in order to provide you an opportunity to practice, the exercises in the training are designed to assume the employees do not have access to ESS.
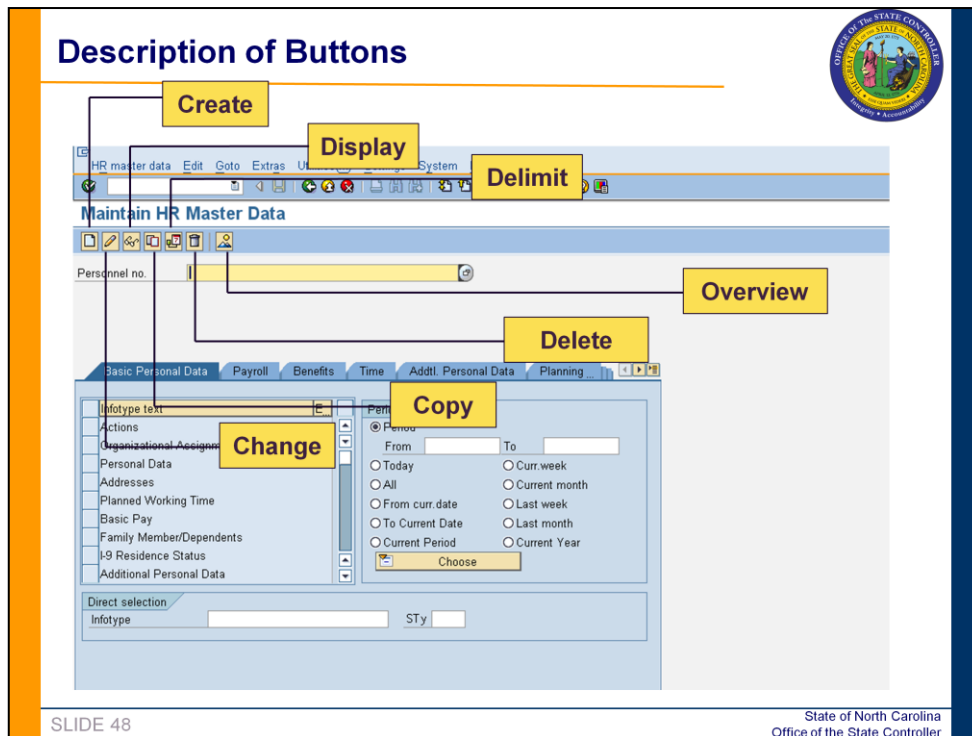
Notes

There are several ways to Maintain Master Data as listed below.

Create: Create a new infotype for an existing employee.

Change: **Do not use!** A decision has been made that State HR will use the Copy function with the original date to overwrite existing data and correct data. You will not use the Pencil icon. You can only correct a current (not historical) record. Only BEST Shared Services can make changes to historical records.

Delete: Eliminate a record. This function should be used with caution, because it permanently removes the information from the database, and cannot be retrieved. Only a select number of HR employees will have security access to use the Delete function.

Delimit: Enter an end date on an infotype to make it inactive.

Copy: Modify or update an infotype to ensure that history is maintained (as long as you change the effective date accordingly). If you don't use a new effective date, you are overwriting history on some infotypes. You must ensure that you use the new effective date when you use this function.

Display: View an individual infotype.

Overview: View a list or summary of the infotype's data.

Notes

There is an important distinction between using the Copy function with the original date and with a new effective date:

- Use the <u>original</u> date when you need to correct an error on existing infotypes. By using the infotype's original date, you are overwriting the history. Be aware that you can only use the Copy function to correct errors on some infotypes. For others, you will have to contact BEST.

- Use a <u>new</u> effective date when you want to create history.

The original date is used to correct data errors. Using this function overwrites the existing data; therefore, there is no history of the former erroneous data. For example, if the person's last name was entered incorrectly, you would not want the incorrect spelling on the employee's record. Using Copy function with the original date in this instance is appropriate so the correct last name is displayed in the employee's record.

You must be extremely careful about the date when using the Copy function. For example, an employee has bank "A", and wants to change to bank "B" the first of next month. If you use the Copy function with the new date (the first of next month), there is a history of both banks. On the other hand, if you used Copy and forgot to put in the new date, it would look as if the employee had always used bank "B"; there would be no history of bank "A". Remember, when using Copy with the original date, there is no history.

NOTE: You can only Copy <u>current</u> records. Keep in mind all history changes must be sent to BEST Shared Services to be changed. This is the same as you did in PMIS with prior forms to OSP for approval/entry.

Corrections for Specific Errors

- **Wrong Employee Group/Subgroup was processed**
  - PA30 and access via Actions infotype
  - Use Overview and Copy functions

  NOTE: Only use this option if Employee Group/Subgroup are wrong. Use Appointment Change Action if circumstances have warranted a new Employee Group/Subgroup.

- **Wrong Hire Date or Separation Date was processed**
  - PA41

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Corrections for Specific Errors
Below is additional information on how to make corrections to specific errors. You will not perform these corrections in class.

Correct an Employee Group/Subgroup
Caution! Only use these steps if the wrong EEGroup or Subgroup was entered and needs to be corrected. If the EEGroup or Subgroup needs to be changed because the employee's circumstances have changed, use Appointment Change, Transfer or Promotion Actions as applicable.

1. Access employee via PA30.
2. Select the Actions infotype.
3. Click the Overview button.
4. Select the line item for the Action that contains the wrong employee group/subgroup.
5. Click Copy.
6. Change the field(s) as applicable to correct.
7. Save. A message displays that your entry will delete a record. Click the green check.
8. Page forward (past Personal Data) until you reach the Organizational Assignment infotype.
9. Click Save.

Correct Hire Date or Separation Date—use PA41
Caution! Only the HR Master Data Approver can make the correction and can only do so if the Action has been completed, and prior to the payroll cutoff date. Having to use this transaction code should be an infrequent occurrence, not a regular one.

Notes

Watch the Instructor complete the exercise. The Instructor will demonstrate using the student scenario. Review the steps on eAssistant as the Instructor demonstrates the process.

Exercise #2.1

PA 30 – Maintain HR Master Data –
Verify Education

Today you received verification from
the educational institution that Jimmy
Chonez has a bachelor's degree.

Enter the verification on the
employee's record.

Student #	Employee #
1	10000022
2	10000023
3	10000024
4	10000025
5	10000026
6	10000027
7	10000028
8	10000029
9	10000030
Instructor	10000011

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Notes

Use the data assigned in the Exercise Guide to complete the
exercise. Use eAssistant for step-by-step instructions.

Exercise #2.2

PA 30 – Maintain HR Master Data -
Monitoring of Tasks

Janet Thomas has 30 days from today
to bring in documentation concerning
her foster child.

Enter the data on the employee's
record.

Student #	Employee #
1	80000286
2	80000287
3	80000288
4	80000289
5	80000290
6	80000291
7	80000292
8	80000293
9	80000294
Instructor	80000295

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Notes

IT0019 is like a tickler file that is date driven. A report is run to determine which employees have transactions coming due soon. Run BI report B0099 or the Date Monitoring report (S_PH0_48000450) in SAP to view the various tasks due. If the task is completed prior to the due date entered, it will still display on the Date Monitoring report unless you change the end date of the Monitoring of Tasks infotype.

You may need to enter more than one IT0019 for a transaction. For example, if the above employee was a new hire, you would enter IT0019 to follow-up on the probationary period, and another one regarding the foster child documentation.

PA 300 VC – Introduction to Create and Maintain Employee Data

Exercise #2.3

PA 30 – Maintain HR Master Data –
Delimit Objects

Marsha Sanders has been notified that the position she currently holds no longer requires that she have a badge and a cell phone. She turned in both of the items today. Delimit the items on the Objects on Loan infotype using the applicable subtypes.

Student #	Employee #
1	80001163
2	80001164
3	80001165
4	80001166
5	80001167
6	80001168
7	80001169
8	80001170
9	80001171
Instructor	80001172

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Notes

Exercise #2.4

PA30 Maintain Employee Data – Maintain Bank Details

Rose Brown has informed you that in addition to her current bank she has a new bank to which she wants to direct 25% of her direct deposit into a checking account. In addition, she wants $100 to go to the new bank into a savings account. The remainder will go to the current bank in her checking account. The effective day is the first of next month.

Update the employee's OSC HR/Payroll SAP record to reflect the change to the banking information. Her new bank is Capital. The bank key is 053112123. Her checking account number is 84568; savings is 684511.

Student #	Employee #
1	80000165
2	80000166
3	80000167
4	80000168
5	80000169
6	80000170
7	80000171
8	80000172
9	80000173
Instructor	80000174

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Notes

If an employee wants to close an account and move to a new account, you should advise the employee to leave the old bank account open until the direct deposit has correctly been made to the new bank or the new account.

Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.

Exercise 2.5

PA 30 – Maintain HR Master Data – Shift Substitution

Jimmy Chonez is being asked to work the day shift Saturday and Sunday next week which are normally his days off. His normal work schedule and position settings indicate that he gets night shift premium. For these two days, night shift premium should not be paid.

Create a Substitution for him for those two days and select the appropriate Daily Work Schedule (DWS).

Student #	Employee #
1	10000022
2	10000023
3	10000024
4	10000025
5	10000026
6	10000027
7	10000028
8	10000029
9	10000030
Instructor	10000011

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Notes

Shift substitution (subtype 02) - A shift substitution involves specifying a Daily Work Schedule (DWS) or Work Schedule Rule (WSR) that the substituting employee will work during the period of the substitution record. A DWS should be used for a substitution of a single day. A WSR substitution is more appropriate for a longer substituting period.

After a Substitution record is created, the maintenance of the record is very important due to the possible changes in compensation due to substitutions for premium eligible shifts. If the actual period or date of the Substitution changes, the relevant Infotype 2003 record must also be updated to ensure proper compensation. If a Substitution is no longer necessary or an employee did not actually work the assigned substitution shift, the relevant record should be deleted to ensure additional compensation is not earned through the original Substitution assignment.

Exercise 2.6

PA 30 – Maintain HR Master Data – Work Schedule

The first day of next month, Jimmy Chonez has requested and been granted a permanent move from his current shift to a 4-day work week nights, 10 hours Tuesday – Friday with Monday, Saturday, Sunday off.

Access the applicable infotype and update Jimmy's files.

Student #	Employee #
1	10000022
2	10000023
3	10000024
4	10000025
5	10000026
6	10000027
7	10000028
8	10000029
9	10000030
Instructor	10000011

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Notes

Exercise #2.7

PA 30 – Maintain HR Master Data –
Withholding W4

Effective today, Leona Grayson would like to have her federal and state withholding changed from 0 allowances to 1. In addition, she does not want any additional money withheld.

Enter the data on the employee's record.

Student #	Employee #
1	80000145
2	80000146
3	80000147
4	80000148
5	80000149
6	80000150
7	80000151
8	80000152
9	80000153
Instructor	80000154

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Notes

Benefits Adjustments

- The Adjustments Reasons infotype (0378) may need to be maintained when:
  - A Qualifying Life Event (QE) occurs and is documented
- Employees have 30 days from date of QE to make allowable changes to benefits plans
- Agency verifies qualifying event documentation
  - Qualifying events documentation must be maintained according to State policy
  - Documentation is kept at the agency level
- Process PA30
- Create infotype 0378-Adjustment Reasons
  - Select applicable reason

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Notes

After an employee enrolls in a benefits plan, he or she can only make changes to the plan during the year when a Qualifying Event (QE) occurs, or during the annual enrollment period.

Examples of QEs are shown on the next two pages.

The agency is responsible for verifying the QE documentation and must maintain the documentation in accordance with State policy. Documentation is to be maintained at the agency level.

In order for the benefits to be changed, the HR Master Data Maintainer must create infotype 0378, Adjustment Reasons.

After infotype 0378 is created, employees can change their benefits by either:

- Accessing Employee Self Service (ESS) and making the change or,
- Completing applicable paper forms and submitting them to BEST Shared Services.

The effective date for infotype 0378 is the date of the qualifying event. For example, in the case of the birth of a child, it is the date the child was born.
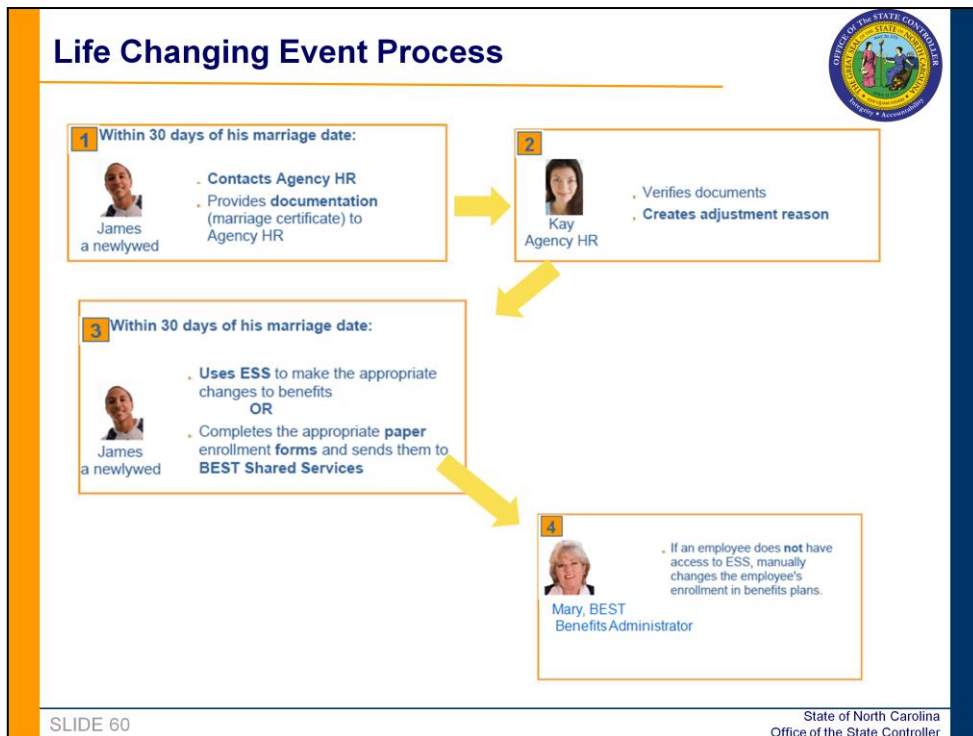
Adjustment Reasons Subtypes

Adjustment Reasons Created by Agencies

- ADDF – Enroll family
- DCAR – FSA Dep Changes (dependent Child FSA changes)
- DRPF – Drop Family
- DTH – Death of Dependent
- DVC – Divorce
- MRG – Marriage (employee marries)
- MRGD – Dependent marries
- NCHD – Add Foster/Step Child
- NLS – No longer a student
- NEWB – Birth or Adoption of a Child
- SEP – Separation
- SMC – Substantial Money Change (> $50)
- SRQ – Subscriber request
- STU – Student

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Notes

When infotype 0378 is created, there are several adjustment reasons listed in the drop-down list. However, only a few of those reasons (listed above) can be entered at the agency level.

If an employee has benefits adjustments other than those listed above, the employee must contact BEST Shared Services.

Adjustment Reasons Subtypes

Additional Adjustment Reasons Created by BEST Shared Services

- ADMN – Admin. Corrections (Administrative Corrections)
- BENE – Beneficiary Changes
- COR – Change of Residence
- CTO – Court Ordered Support
- FLOE – NCFlex Annl Enroll (NCFlex Annual Enrollment)
- FSC – Cancel while on FMLA
- FSN – FMLA Nonpayment
- HIOE – Hlth Ins Annl Enroll (Health Insurance Annual Enrollment)
- HIRE – New Hire (also used for reinstated employee)
- LATE – Late Entry in Health (SHP only)
- MCP – Medicare is Primary
- MLT – Military Leave Term
- NLS – No Longer a Student
- NPY – Nonpayment of Health (SHP only)

- NWEL – Newly Eligible
- ODP – Maximum Age Dep.
- OLV – LOA without leave (and without pay) – note that the adjustment name is not the same as the name of the Action (LOA)
- PTAX – Pretax to Post tax
- REC – Hrs < 20 Not Eligible
- RET – Retirement Changes
- RFL – Return LOA (without Leave) – note that the adjustment name is not the same as the name of the Action (Reinstatement)
- RHN – Reduced Hrs – No COBRA
- SAV – Savings Plans
- SMC – Subst. Money Change (Substantial Money Change)
- STD – Short-term Disability
- STU – New Student

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Notes

BEST Shared Services has the authority to use all of the benefits reasons, including the ones used by the agencies (listed on previous page).

Additional reasons are listed above for which an employee must call BEST Shared Services.

A complete list of the benefits adjustments is available online at BEACON University. Under Courseware and job aids, select the **Benefits** functional area, Benefits Job Aid folder, and the BN200 Adjustment Reasons file. The reasons with the asterisk (*) on this job aid can be created by Agency HR. The other reasons must be created by BEST Shared Services.
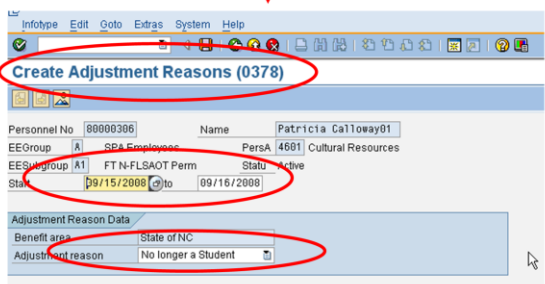
NLS – Agency or BEST?

- Employee notifies Agency <u>within</u> 30 days
    - **Agency** uses PA30
    - IT0378, subtype NLS
    - Enter Qualifying date

    Note: Benefit plans starts/stop the first of the month after the IT0378 start date

    - Save

- Employee notifies Agency <u>after</u> 30 days
    - **BEST** process
    - Agency cannot process

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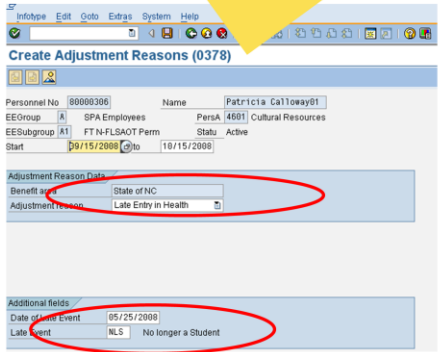Office of the State Controller

Notes

When an employee's child no longer qualifies as student status, it is critical that the employee notify the agency within 30 days of the event. Otherwise, the Adjustment Reason cannot be processed at the agency level; it must be processed by BEST.

.

Notes

If notification regarding the child no longer being a student is done 30 days after the event, the employee must understand the following:

- Any claims that were paid on behalf of the student will have to be repaid to the insurance company.

- Any premiums that the employee had deducted to pay for coverage including the child will not be reimbursed.

Important Items

- Benefit Plans start the first of the month after the Adjustment Reason date (except birth of child).

- Use the appropriate Adjustment Reason.

  – COBRA events are triggered through the Adjustment Reason

EEGroup	A	SPA Employees	PersA	1401	State Controller
EESubgroup	A1	FT N-EL SAOT Perm	Statu		Active
Start	09/30/2008	to	10/30/2008		

Adjustment Reason Data

| Benefit area | State of NC |
| Adjustment reason | ADDF Enroll Family |

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Notes

The effective date of IT0378 is critical. Except for birth of a child (benefits begin on date of birth), benefit plans start the first of the month after the Adjustment Reason date. So, for example, if a spouses loses job and health coverage on October 1, the Adjustment Reason date must be September 30 in order for State plan to start on October 1; otherwise if IT0378 is effective October 1, the State plan won't start until the first day of November.

Exercise #2.8

PA30 Maintain Employee Data –
   Benefits Adjustment

Emily Stafford has provided
documentation that she just had a
daughter who needs to be added to her
benefit plan. The baby was born the
first day of the current month.

Student #	Employee #
1	80000206
2	80000207
3	80000208
4	80000209
5	80000210
6	80000211
7	80000212
8	80000213
9	80000214
Instructor	80000215

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Notes

Use the data assigned in the Data Guide to complete the exercise.
Use eAssistant for step-by-step instructions.

Lesson Review

In this lesson you learned to:

- Describe the process to maintain (update) employee data
- Identify the transaction code used to update employee data
- Distinguish among the editing functions
- Use OSC HR/Payroll SAP to maintain employee data
- Identify the steps needed prior to creating an employee's benefits adjustment
- Create a substitution
- Revise a work schedule
- Create a benefits adjustment

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Notes

Course Map

Lesson 1: Connecting the BEACON Dots

Lesson 2: Maintaining Employee Data

Lesson 3: HR Reports Overview

Lesson 4: Course Review

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Notes

Lesson Objectives

Upon completion of this lesson, you should be able to:

- Identify the two applications that house reports
- Describe how to access reports in both applications
- Describe the available HR reports
- Add additional fields to an OSC HR/Payroll SAP report
- Use multiple selections in a specific field
- Execute and view an OSC HR/Payroll SAP HR report

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Notes

Where to Find Reports

SAP	BI
Real time data*	Data at a point in time *
Transactional reports	Analytical reports
Performance considerations for large data volumes	Aggregation of large data volumes
Data by functional area	Merge disparate data
Current data only	Include history data with current data

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Notes

Human Resources reports are housed in both OSC HR/Payroll SAP and Business Intelligence (BI). You can see in the comparison above the advantages of each reporting system.

You can see a list of BI reports (and a description) by accessing the applicable job aid from BEACON University. A list of the SAP HR reports is available from the SAP reports menu.

For more information on reports, see the online reporting class.

* Many OSC HR/Payroll SAP transactions are posted at the time the entry is made. Therefore, when you run an OSC HR/Payroll SAP report, for example for today, the data is current including today's data. Data is loaded into BI daily; therefore when you run a report in BI, for example for today, you are actually viewing yesterday's data.

If you have security access to run BI reports, you will see a Reports tab on your portal.

On the initial screen, you first select the report name in the left panel.

Next, enter the mandatory variables (Org Unit and date).

BI Reports (2 of 2)

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Notes

On the next screen, you can literally drag and drop any of the fields from the free characteristics list onto the report. The rows and columns above the free characteristics section automatically default into the report.

You can print the report, write comments, send to someone else, or export to an Excel spreadsheet.

Accessing OSC HR/Payroll SAP Reports

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The OSC HR/Payroll SAP reports are accessed via the Easy Access screen, or by using the applicable transaction code. The reports are categorized according to employee, Organizational Management, documents, administration compliance and administration garnishments.

Since the report output is determined by your security role, you will only see those employees for which you have been given security access.
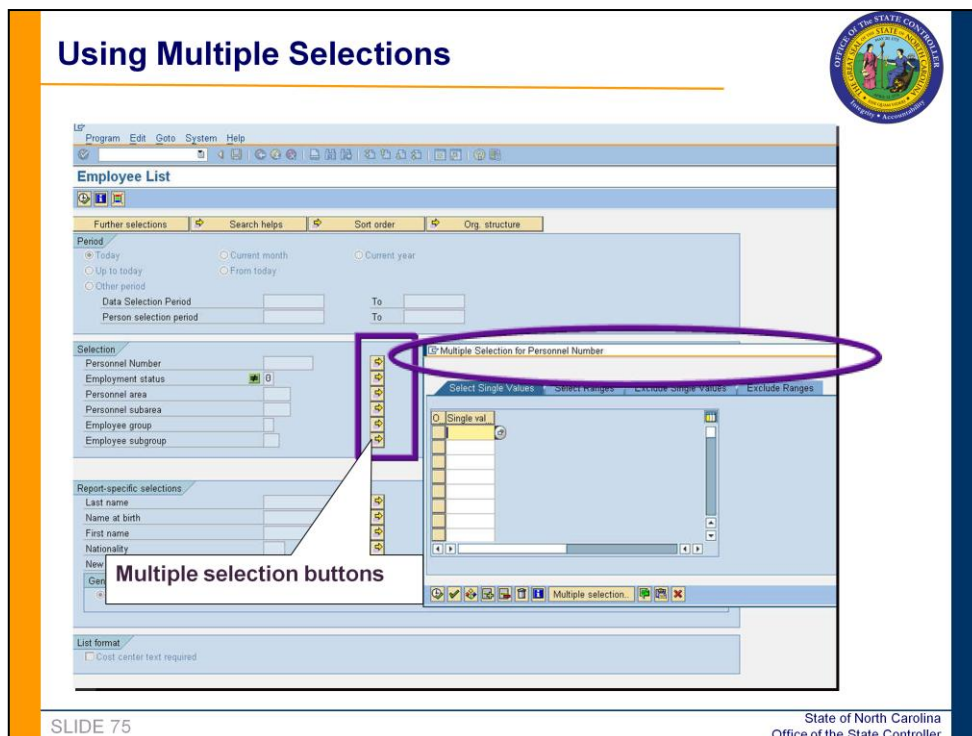
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Notes

In OSC HR/Payroll SAP, the first screen of each report allows you to specify the data you want to view in a report. The type of fields that display on the selection screen differ for each report.

NOTE! You should never run the report without specifying the selection criteria. If you do not specify selection criteria, the OSC HR/Payroll SAP system must search through the entire database for the employees to which you have security access. If several people are running reports at the same time without any selection criteria, the capacity of the OSC HR/Payroll SAP reporting system is unnecessarily taxed which could result in a slow response.

OSC HR/Payroll SAP reports have many options and functions. In this class, we only cover a few of them. The selection screen includes:

  • **Period**: Select specific time frames that you want included in the report. To specify a specific date (or range), you must select the *other period* radio button and then enter the dates.

  • **Selection**: In this area, you select the specific criteria you want included on the report, for example, personnel area, employee status, just to name a few.

  • **Further selections button**: Use this function if you want to add, or remove fields to the *Selection* area. Observe in the illustration that the *Personnel Area* and *Personnel Subarea* fields are not present in the Selection area. You can use the Further selections button to add those fields to the screen.

Using Multiple Selections

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<u>**Notes**</u>

The yellow arrows beside each field are called *multiple selection* buttons. When you click the arrow, a new window is displayed. On that window, you can use the tabs to indicate :

- Additional single criteria
- A range of criteria
- Single criteria to exclude
- A range of criteria to exclude

Observe in the illustration above that the Selection button was used to add the Personnel Area and Personnel Subarea fields. They now display on the screen as fields to be used for selection criteria.

Entering the appropriate selection criteria is key to getting accurate report results. For example, if you narrow your selection criteria too small, you may get a message that there are "no values".

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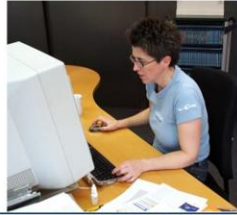State of North Carolina
Office of the State Controller

Notes

When you have entered all of the selection criteria, click the Execute button to run the report.

NOTE: Sometimes when you are running a report, or performing other transactions, the system may display to be taking an inordinate period of time. You can stop the transaction by clicking the icon at the top left of the screen, and selecting **Stop Transaction** from the menu.

Exercise #3.1

Run the Employee List Report for personnel area 4601

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Notes

SAP reports can be run from the SAP Easy Access screen via the following menu:

Select *SAP menu > Human Resources > Personnel Management > Administration > Infosystem > Reports > Employee*

For this exercise use the menu and select Employee List.

Lesson Review

In this lesson you learned to:

- Identify the two applications that house reports
- Describe how to access reports in both applications
- Describe the available HR reports
- Add additional fields to a OSC HR/Payroll SAP report
- Use multiple selections in a specific field
- Execute and view a OSC HR/Payroll SAP HR report

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Notes

Course Map

Lesson 1: Connecting the OSC HR/Payroll SAP Dots

Lesson 2: Maintaining Employee Data

Lesson 3: HR Reports Overview

Lesson 5: Course Review

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Notes

Course Review

In this course, you learned to:

- Recall terms and concepts from the *Personnel Administration Terms, Concepts and Display Data* course

- Explain how Personnel Administration infotypes affect Time, Benefits and Payroll

- Modify existing employee data

- Identify the options to access reports

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Notes

Notes

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

- Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

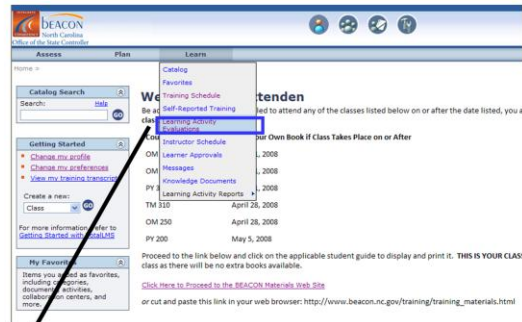**Need transactional assistance after go live?**

- Remember to access BEACON Help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON Help from within an SAP transaction.

Notes

1. Open a new internet browser and type the url:

   http://rod.sumtotalsystems.com/beacon

2. At the Log On screen, enter your full email address and password. If you cannot log into LMS, unmute your telephone and let the instructor know. The instructor can reset your password if you have forgotten it.

3. Click **Logon**.

4. On the blue horizontal bar near the top of your screen, click **Learn**, and then click **Learning Activity Evaluations**.

5. Locate the evaluation that corresponds to the class you've just completed and click the **Start** button to launch it.

6. Complete the evaluation.

7. Click the Training Center icon and then click the green check to let the instructor know you have completed the evaluation.

If you cannot access the evaluation, please unmute your telephone and let the instructor know.

Notes